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ABSTRACT

While many educational institutions pay lip service to quality, often the very documents they produce, such as training handbooks and reference manuals, are not themselves of high quality. Quality documentation helps employees find what they are looking for, know when and where to ask for help, and become more independent. At Central Piedmont Community College (CPCC) in Charlotte, North Carolina, division managers were asked to detail the specific regulations and procedures for which they were responsible to be compiled into a single reference manual for employees both seeking and giving services. The resulting document, the "Business and College Services Manual" (BCSM) would explain how to purchase supplies and equipment, travel reimbursements, hiring procedures, how to report a crime, and dozens of other topics. The BCSM was organized by division, rather than by function (e.g., the issuance of parking tickets was discussed under the Safety and Security Department, while the collection of fines was described under Financial Services), making the manual convenient for managers but not for users. To address this problem, a task force of manual users was convened and the decision was made to completely re-write the manual. To edit the new manual, three staff members were formally trained by Information Mapping, Inc., in the Information Mapping documentation standard. This standard utilizes tables and other graphic devices within the main body of the text. All documentation is maintained electronically in computer files so that revisions can be made more easily. Sample pages and text from the original and the revised CPCC "College Services User's Manual," and a list of information sources are included. (PAA)

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The Well-Documented College

How to Produce Good Documents

Bill Perkins

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Summary

A college needs good documentation to assure consistent and efficient job performance at all levels of the organization. In order to produce quality documentation and service, a college administration must seek out well-trained document editors, either inside or outside the organization. Information Mapping, Inc., offers a documentation standard and training. A large college should consider employing one or more full time editors able to create and maintain well-edited manuals using both desktop publishing and electronic document technology.

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The well-documented college

by Bill Perkins
Writer-Producer
Central Piedmont Community College
presented to the League for Innovation Conference, Orlando, Florida, 1992.

Every college represented in this room can be a well-documented college.

My rationale for bringing this topic to the conference was simply this: In all the excitement and hoopla about computerization and high tech, we need to be reminded that content is what really counts. All the expensive, fancy computer gear is the means to the end. Sure we want connections to the world, we want faster computers, more storage, and all that. But above all, we want better information and easier access to it. We want information that's up to date, accurate, and understandable. Content is what counts.

I'm going to talk for a few minutes about the quality craze, about how the Central Piedmont Community College College Services Manual came to be, make some recommendations, and then I'll open up the floor for comments, questions, or whatever.

The purveyors of computer software and hardware do a very good job of convincing us that their products are going to transform our work into something glorious. Of course, what the vendors are really selling is a tool. The truth is I can't write great reports or manuals by using a new computer or new word processor any more than I can build a fine deck on my house by buying the latest, robust circular saw. The fact that I composed this speech on a world-class word processor says nothing about its semantic content. A great tool does not a craftsperson make.

No, what I need to write great documents is writing know-how, and I can't get that know-how by learning computer software and upgrading my hardware. What I need to know in order to write a good employee manual is not in the WordPerfect user's manual. Critical writing skills do NOT come shrink wrapped with word processors or boxed with laser printers. All those things, those critical skills, have to be in my head.

Here's an illustrative quote from Videography magazine on the sensational advances in digital video and TV hardware:

> "It seems that even with dramatic cost reductions in production technology and improvements in the user interface, the desktop video market has not exploded as the [hardware manufacturers] had hoped. The essential ingredients for a successful video production have more to do with the creative process than with the mechanics of how we integrate the pictures and sound. Manufacturers have figured out how to stuff all the hardware in a box, but what about creativity? "

The culture of quality

A lot of people pay lip service to quality management, quality service, quality control, quality circles. They're committed to quality, sold on quality, married to quality. Which reminds me of the once fashionable custom of bestowing virtue on girls with names like Prudence, Patience, Faith, Hope, and now, I suppose, Quality. Be that as it may, talking about quality is just one way to communicate a commitment. But the platitudes about quality that drip so easily from the silvered tongues on the convention circuit don't, in the vernacular of eastern North Carolina, "feed the bulldog."

I'm here to advocate quality in a more objective, substantial, and verifiable way—by putting quality into the reference and training documents, the manuals and handbooks, both printed and electronic, that your college employees rely on for help when performing some work-related task, either mission-critical or trivial. Charity begins at home. So does quality.

Nothing communicates a commitment to quality as much as a carefully crafted and well-designed tool that helps people do their best work. Which brings me around to my first point—great tools do not a craftsman or craftswoman make. And a great reference document is **only a tool**, but in the hands of a fully functioning employee that tool, that **document**, will make all the difference. The well-documented college is a place where people share the institutional culture informally **and formally** through documentation. **If you see quality as a part of your**

institutional culture, you'd better be sure that quality documentation backs it up.

But you have to understand that the creation of a good document is not a trivial task. It's real work, time consuming work. It takes analysis, writing, editing, and revision on a regular basis. The payoff comes when employees find what they're looking for, become more independent, and know when and where to ask for help. At the well-documented college, information is accurate and accessible.

A Case Study

Now, I'd like to introduce a case study. . . . .
A few years ago at Central Piedmont Community College, a vice president for business and college services saw the need for a single document, a manual, that would be a reference for employees both seeking services and giving services. The college already had a conventional policies and procedures manual, but it didn't spell out in functional, operational terms what an employee needed to do in order to receive services.

For example, the new Business and College Services manual would explain how to purchase supplies and equipment, how to get reimbursed for travel, how to recover a towed away car, how to hire someone, how to report a crime, how to get a telephone—dozens of other informational and how-to topics.

In addition to bringing consistency and efficiency to college services, the manual would also be a part of the orientation for new employees in the Business and College Services area.

How was such an encyclopedia of useful information going to be written? Think for a moment about how **you** would proceed. The VP turned to the managers of the business and college services area, his subordinates, and said in effect "Write up what you do—write down the regulations and rules, the procedures you follow and we'll put it all together." In other words, the manager of the business office would have her workers detail the things they were responsible for, the plant operations manager would

do the same, so would the auxiliary services manager, and the personnel director, and everybody would know how things are done and who does them. No one saw the need for a documentation specialist or editor to create a unified manual from the sum of the parts.

The manual, a page of which is before you as page 1 of your handout, was produced in a running two-column, newsletter style by a secretary using WordPerfect. Each chapter was identified with the office that produced it. For example, you're looking at a portion of the Safety and Security department chapter, which included many topics, some of which are highlighted on the page.

Take a minute now to glance over the material in the Parking section—top of the right hand column—and answer this question: If you got a parking ticket, how would you pay it? .... . Well, you needn't search for long because this is a trick question. There **is no** mention of paying parking fines in the passage. Well, there's a perfectly natural explanation for the missing piece of information. Remember I said the manual sections were produced by the separate departments, who **wrote only about the things they were responsible for**. It turns out that the department that issues the parking tickets is not the department that collects the fines. A naive user of the manual would **not** know that parking fines are paid at the Cashier's office and that the information about paying fines is in the **Financial Services section of the manual under Billing and Collections**.

As you can imagine, similar problems cropped up elsewhere in the manual. Just think of the many ways administrative functions are specialized and yet interconnected at your college and you have a pretty good idea of how many times a user of the manual found information about a topic missing from the chapter he or she was reading.

Does the user need to know the work flow in order to receive a service? Of course not. By the same token, a manual user shouldn't need to know the work flow in order to get information about regulations, procedures, and processes.

In short, the first manual was structured for the convenience of the **managers** of the business and college services division and **not** for the convenience of the users of business and college services. What was **needed** was a functional, user-oriented manual with the information arranged functionally and topically so that a user could find, say, all the information about parking in one area of the book. What was **produced** was unsatisfactory from the user's point of view.

The VP convened a task force of manual users, headed by the college's expert on policies and procedures, to revise and improve the manual. The task force members spent some time trying to fine tune the existing manual and finally decided that a complete rewrite was the best way to orient the manual toward the user.

The head of the task force knew a college staff member who had recently learned and applied the Information Mapping documentation standard. The staff member agreed to join the committee and quickly recommended that the task force sponsor the training of two more editors, already on staff in other capacities, who would then constitute a three member editing team, each working part time on the manual. The two new editors attended the Information Mapping seminar.

The three editors divided up the work. One worked on a Mac; the others on DOS machines. All three used Information Mapping's word processing macros to help create the Infomapping look on the page. Each worked independently of the others most of the time. But thanks to the common training, each was able to produce to the common standard.

Page 2 of your handout is an excerpt from the revised manual, which now contains several pages on parking, including a section on regulations, visitor parking, maps of parking areas, and the parking fines page before you.

The Information Mapping solution

The page layout follows the standard set by Information Mapping, Inc., the company that trained the three editors. In the Infomapping system, the page you're looking at is called a **map**. The top line is the **map title**, the narrow column on the left side contains **labels** and the wide right hand column contains **blocks**.

What you see is only the presentation style, the typographical face of the method. You see that the information on the page is more accessible and better organized than paragraphed text. What you **don't** see is the highly developed writing and editing methodology that produces the page.

One principle governing what you see on the page is the effective use of tables and other graphic devices **within** the main body of text. Readers shouldn't have to flip around in the text looking for charts and graphs.

Take a look now at page 3, which shows a passage from the original manual and the tabular version below it.

Compare the two treatments.....The original passage in paragraph form **does work**, but not as quickly as the tabular form. Which would you rather turn to for information?

Paraphrasing an article in Administrative Management:

> "The Information Mapping method helps managers and professionals solve complex communications tasks by giving them a method to organize and analyze material, test it for completeness and accuracy, determine its content and format. It also helps them deal with problems of sequencing, structure, level of detail, consistency, and the management of complexity. Also, by standardizing the way information is presented, the method allows teams of writers to contribute to the same document with minimal editorial difficulty."

Editorial difficulty is an issue, and one difficulty is managing revisions. In the printed book mode we have merely snapped a picture of the

organic, changing procedures and processes at a particular moment in time. The book is dated even as it's being printed. Revising the printed book is a tedious, expensive process of printing, distribution, and posting of revisions by many users. Electronic documents distributed via computer networks make a lot more sense.

Yes, modifying a purely electronic document for distribution is a lot easier. But you're making a mistake if you merely scan your existing manual or copy the word processed text files. The benefit of electronic distribution will not be fully realized unless you revise the manual to a higher standard **before** you put it on-line. Remember, it's the content that counts. Just putting your document on a file server isn't going to make it better.

Finally, how do we get organized to produce good documents? At Central Piedmont, we have a more of less permanent committee to review and revise the *College Services Users Manual.* We have three trained editors who can work part time on the project. We have a new VP for Business and College Services who is Total Quality Management personified. I think we have a commitment to train more editors—the more trained people, the easier it is to start new documents and update existing ones.

If you want to produce good documents, find competent, enthusiastic editors and give them training. You must give them the tools they'll need: a laser printer, Microsoft Word or WordPerfect, and a fast microcomputer, DOS or MAC, with lots of disk space. Information Mapping offers good training and very helpful word processing macros to expedite document preparation.

In the long run, I think a large institution should consider hiring or reassigning a full-time person or persons to do the work of creating and maintaining the college's documentation both in print and electronic form. It really is a full time job.

Every college represented in this room can publish quality documents, either on paper or electronically. It's everybody's business.

EMERGENCY ASSISTANCE

For any emergency call 6444 and give the following information clearly:

Your Name
Location of the emergency
(Building, Floor, and Room)
The type of emergency

The dispatcher will ask you detailed questions about the emergency so that the proper assistance can be dispatched to the scene. Please be calm and patient, and provide the information requested because accurate information is essential to provide the correct response to your request. Do not hang up the phone until you are certain that the dispatcher completely understands the nature of the emergency.

The following items are typically considered to be emergencies:

Fire
Fighting
Assaults
Personnel Accidents
Involving Injuries
Acute Medical Problems
(Heart Attacks, Seizures)
Elevator Failures

The 6444 emergency number is reserved exclusively for the reporting of emergencies and should not be used to report routine security problems. Non-emergency security items should be called in to 6632.

BUILDING ACCESS

Security is responsible for unlocking doors in the morning and locking them after the last classes during normal operating periods. After hours access can be gained by going to the Central Dispatcher's station on the first floor of the Massey Building, presenting a CPCC identification card.

PARKING

The appropriate parking stickers are required to be displayed on all vehicles parked in CPCC's Faculty and Student parking lots. Parking stickers for employees are available through the Security Office.

Vehicles parked in Faculty and Student parking lots without the proper sticker may be ticketed. Complaints about tickets should be referred in writing to the Plant Services Manager, Massey Building.

Limited amounts of visitor parking is [sic] available in front of the Terrell Building and behind the Learning Resources Center. The parking in the Terrell Building's visitor parking lot is restricted to one (1) hour and it will be routinely patrolled by a guard who will issue tickets to violators. The parking lot behind the Learning Resource Building are [sic] designated as long term visitor parking. Any Student or Faculty/ Staff vehicle found in the visitor parking lots will be ticketed immediately.

CRIME REPORTING AND INVESTIGATION

All CPCC employees are requested to report all crimes or criminal activity at CPCC immediately to Security (6632) for investigation. Any CPCC employee who witnessed or has knowledge of a crime or criminal activity may be required to appear in court and testify if necessary.

Employees or Students who wish to report suspected criminal activities in a confidential and discrete [sic] fashion may do so by contacting the Plant Services Manager directly at 6524.

— END OF EXCERPT —

Employee Parking Fines

Regulations

Parking tickets are issued by security officers for

- not displaying parking hanger decal
- parking over lines
- parking in handicapped space without permit ($100 fine by City of Charlotte)
- parking in nonparking areas
- parking in visitor parking areas

Paying fines

Fines may be mailed or paid directly to the Cashier's Office (first floor Terrell Building).

NOTE: Pink City of Charlotte parking tickets must be paid according to the instructions on the ticket.

Protest policy

An employee who wishes to protest a CPCC citation and/or towing charge shall file a written appeal with the Manager, Plant Services Group.

Appeals process

If not satisfied with the manager's action, the employee may file an appeal with the CPCC Parking Committee. The committee's decision will be final.

Loss of parking permit

A parking decal renewal will not be provided for any employee who has unpaid parking fines on record on the date (each fall quarter for full time and adjunct employees; each quarter for supplemental employees) when parking permits are renewed.

— END OF EXCERPT —

Original

Meeting the above criteria, you may receive a full refund within the first 10 days or a 3/4 refund if returned during the second 10 school days. If books are purchased later in the quarter, the customer has the same 10 day return limit for a full refund. After the 3/4 refund period expires, the book return is handled as a buy-back and 1/2 price is refunded.

Revised

Calendar Days from Purchase	Refund
1 to 10	full
11 to 20	3/4
more than 20	1/2

Information Sources

Books

Horn, Robert E. *Developing Procedures, Policies, and Documentation.* Waltham, Mass.: Information Mapping, Inc., 1989. The Infomapping® bible published as the textbook for Information Mapping® seminar of same title.

Horn, Robert E. *Mapping Hypertext: The Analysis, Organization, and Display of Knowledge for the Next Generation of On-Line Text and Graphics.* Waltham, Mass.: Lexington Press, 1990. A research-based examination of the key theories and problems associated with hypertext and how the Information Mapping® method provides solutions. Unusual, thought-provoking. Available from Information Mapping, Inc., 300 Third Avenue, Waltham, 02154. 617-890-7003.

Magazine articles

Raybould, Barry. " A Case Study in Performance Support." *CBT Directions*, October 1990, 22-31.

Smith, Thomas.W. "Desktop Publishing in the University: Current Progress, Future Visions." *Academic Computing*, May 1989, 26-36.

"Textbooks on Demand." *IN-PLANT Reproductions*, April 1992, 16-17.

Weibel, Bob. "Paper: Less at Last?" *Desktop Communications*, July-August 1992, 23-24.

Interesting magazines

Corporate Computing by Ziff-Davis, publisher of *PC Magazine* and *MacUser.*

Interesting software

Docutrieve by Abacus Software

Folio Views by Folio.

Hyperties by Cognetics, Inc.

Lotus Notes from Lotus Development.

Microsoft Word

OnQuest by CES Training, a division of Sterling Resources

Owl Guide by OWL International

WordPerfect

WorldView by Interleaf